

Appendix A
Montana Historic Preservation Planning
Questionnaire #1
2001

Results
&
Discussion

Montana 2001 Historic Preservation Planning Questionnaire #1 Discussion

The Montana Historic Preservation Planning Questionnaire #1 was distributed in early Spring 2001 to approximately 220 individuals listed in the Montana Historic Preservation Services Directory. These persons can be broadly classified as “historic preservation professionals.” Questionnaire #1 was accompanied by a revised 2001 edition of the Directory and a stamped self-addressed return envelope. Sixty (60) responses were returned, or 27 percent (see below, Question 7 for a breakdown of respondents).

The seven questions in the 2001 Questionnaire #1 were designed to build upon the existing Montana state plan: Working Together: The Montana Historic Preservation Plan (Montana SHPO 1997). By asking the same or similar questions, we hoped to evaluate how much has changed in the past 5 years and to assess to what extent the state plan would require revision or replacement. Question 1, for example, repeated the first question in a 1996 questionnaire (Working Together: Appendix A: Questionnaire #2) by asking respondents to scale the significance of the same list of issues in historic preservation. Question 2 asked respondents to rate the priority of the nine goals also identified for comment in the 1996 questionnaire and ultimately adopted in Working Together. The remaining questions (3-6), though not duplicates, followed several lines of inquiry used in an earlier questionnaire from 1995/1996. Questions 3 and 4 asked respondents to rank the importance of 10 primary MT SHPO programs, rate their effectiveness, and tell us which should receive priority for new funding; Question 5 requested a list of kinds of properties meriting special attention; and Question 6 asked to identify guidance that would be most beneficial. Question 7 asked individuals to tell us what their primary working role in historic preservation is.

The tabulated results for each of the questions in the 2001 Questionnaire #1 are attached, based upon the 60 responses received. Notes are included for explanation as needed and to describe varying sample sizes. While the numbers and words largely speak for themselves, responses to each of the questions are also highlighted and discussed briefly here.

Issues in Historic Preservation (Question 1).

Comparing the results of the rating of 18 potential issues affecting historic preservation in 1996 with 2001 indicates that little has changed in this respect. Three of the top four issues deemed most significant in 2001 are the same as those identified 5 years ago. These are (by order of significance in 2001):

- 1) availability of financial resources*
- 2) local ability to preserve historical/cultural resources*
- 3) public awareness of culture/preservation issues.*

The fourth most significant issue recognized in 2001 is:

4) *effect of suburban sprawl on Main Streets.*

This issue ranked fifth in 1996. Included in the top four in 1996 but not in 2001 is: *vandalism and/or deterioration of historic resources*. This issue ranked sixth in 2001.

Similarly, the same four issues ranked the lowest in both 1996 and 2001. These were: *information age communication changes*; *housing affordability and availability*; *baby-boomer attitudes about historic preservation*; and *shifts from industry/agriculture to service based economy*. While no issues came close to being ranked “insignificant” (value = 1) in either 1996 or 2001, these four issues, adjusting for score inflation, could be considered weak, or at best, neutral.

Overall, the important issues affecting historic preservation in 2001 appear to be the same as those in 1996. While space for write-in issues was not provided in 2001, none were written on the returned questionnaires.

Goals for Historic Preservation (Question 2).

People were asked to rate the priority of the nine goals adopted in the 1997 Montana State Historic Preservation Plan, Working Together, on a scale of 1 to 10. All goals ranked on average above 6.0. The highest priority in 2001 ($x = 9.11$) was given to Goal #1: *Conserve Montana’s cultural resources*, which was also adopted as the overall mission of the Montana State Historic Preservation Office in the 1997 Plan.

The lowest priority in 2001 ($x = 6.24$), was accorded to Goal #9: *Create recreation links among Montana’s natural and cultural sites*. When asked in 1996 how respondents felt about the same nine “goals and strategies,” most agreed with all them, but “about 20% felt that the goal related to recreational linkages was not appropriate” (Working Together, Appendix A.). Based on this information, Goal #9 should be given careful consideration in a Plan revision.

Interestingly, respondents rated Goal #8: *Study issues and develop plans for preservation*, second lowest ($x = 6.89$). This suggests that Montana historic preservation professionals do not consider the planning process a high priority activity in 2001, possibly because the planning conducted five years ago is felt sufficient to guide preservation in 2001.

Respondents were also given an opportunity to write-in up to three additional goals. A list of these is provided in the results. Many of these are focused activities more than goals (e.g., *conduct regular statewide meetings*; *focus on street-scapes*; *promote tax credit program*, and so forth) while others could arguably be subsumed under the existing nine goals (e.g., *make historic preservation more politically appealing* = Goal #2?; *utilize the media to raise public awareness* = Goal #4?; etc.). These write-ins should nonetheless be considered information for formulating specific objectives or tasks and for the potential development of new or revised goals. Of the write-in suggestions, several appeared three or more times and, as such, deserve special consideration. These include:

- . *Involve tribes/reservations/THPOs (n = 4)*
- . *Create on-line databases and information management systems (n = 3)*
- . *Make historic preservation more politically appealing (n = 3)*

Montana SHPO Programs (Question 3).

Question 3 asked respondents to rank the importance of the core service programs of the Montana SHPO (to the individual and to the state) and to also rate SHPO's effectiveness in providing that service. The question caused confusion among at least half of the respondents whose scores could not be counted. This was probably a result of introducing a sequential ranking system (1 to 10) with 1 as the highest and 10 the lowest; whereas previous questions (and the part of this question about effectiveness) allowed values to be used more than once with 10 being highest and 1 lowest. The confusion was evident both in the lack of responses and error in the form of response. Depending on the part of the question, between 22 and 36 responses were deemed usable, although it is still possible that some unintended reverse sequencing has obscured the data.

With respect to order of importance to the individual, the top three SHPO programs are:

- 1) *Survey and Inventory*
- 2) *Technical Assistance and Advice*
- 3) *Review and Compliance*

But with respect to perceived importance statewide, the top three SHPO programs are:

- 1) *Planning*
- 2) *Survey and Inventory*
- 3) *Technical Assistance and Advice*

Apparently, many historic preservation professionals recognized *Planning* (including goals, contexts and public input) as important on a statewide basis but not to them individually (ranked 5th). As individuals, SHPO's *Review and Compliance* functions (e.g., Section 106) were important. *Review and Compliance* ranked only 7th in statewide importance.

In terms of the effectiveness of SHPO core programs, all ten services were rated 6.0 or higher. *Technical Assistance and Advice*, ranked high in importance both to individuals and to the state (see above), was also rated the most effective program area (7.7). Respondents to surveys in 1995/1996 also rated SHPO as a "good provider of training and technical assistance" (*Working Together*, pg. 6). This program area was followed closely by *National Register of Historic Places* (7.6), *Survey and Inventory* (7.4), *Review and Compliance* (7.3), and *Administration* (7.2). The only program ranked as important to individuals or to the state that did not receive a similarly high effectiveness rating is *Planning* (6.3). The lowest effectiveness rating was accorded to *Matching Grants for*

Survey & Bricks n' Mortar (6.0), a clear recognition that the Montana SHPO had not offered such sub-grants for the past 10 years.

Investment of New Funds (Question 4).

Survey respondents were asked how they would invest an additional \$100,000 in funding in the core programs defined in Question 3. Most respondents replied with a single program; a few indicated two or three programs. *Matching Grants for Survey and Bricks n' Mortar* received the most votes (24), followed by *Heritage Education and Outreach* (16), *Survey and Inventory - recording and databases* (14), and *Technical Assistance and Advice* (11). Other core program areas received 5 votes or less.

The top two programs recommended for investment of new funding both received relatively low current effectiveness ratings (see Question 3). Additional funding may be seen as a way for SHPO to improve the effectiveness of these programs, as is most certainly the case for matching grants. It is interesting, however, that these two program areas also received only moderate or even low relative ranks of importance to individuals and statewide preservation. *Matching Grants* was ranked 7th in importance to individuals, and 9th statewide; *Heritage Education and Outreach* 6th and 5th. It is possible that the respondent's ranking of relative importance of these programs is influenced by their level of current activity.

Heritage Properties Meriting Special Attention (Question 5).

In 1995/1996, SHPO questionnaires asked the public about specific heritage properties in their region which were deserving of preservation and care (Working Together, pg. 5). A long list of individual properties was returned, indicating that respondents were well-informed. Notable for types of heritage properties in 1995/1996 were ghost towns, historic neighborhoods, and archaeological sites. The historic gold-mining town of Virginia City, which at the time was being considered for state acquisition, was the single-most frequent specific property response.

The 2001 Questionnaire s asked only about *kinds* of heritage properties, and invited respondents to list up to three types. Responses included a total of 138 property types, or an average of 2.3 per respondent. Categorized broadly, historic site types were mentioned most often (n = 85), followed by archaeological sites (n = 30), traditional cultural sites (n = 17), and landscapes (n = 6). (Note that rock art sites were counted as both archaeological and traditional cultural sites).

Property types mentioned more than ten times include *Rural Agricultural Buildings* (barns, grain elevators, homesteads) (16), *Downtown Buildings/Mainstreets* (14), *Railroad Features/Depots* (12), *Archaeological Sites-general* (12) and *Rock Art Sites* (10). The top three are in fact secondary groupings defined in part by individual though closely related property type responses. It might be possible to define other such groupings from the data, for example: post offices + courthouses = government/public

buildings. However, the primary groupings defined here are the most readily defined interpretations of the data.

Helpful Guidance (Question 6).

An unexpected range of guidance was identified by respondents as beneficial. As with Question 5, some simple groupings of closely related requests could be made and other groupings may be possible. The two most frequently identified types of guidance as being of most benefit to respondents are *answers to specific technical questions* and information about *sources of grants or other financial assistance*. Both were mentioned seven times.

No directly corresponding question was asked during surveys in 1995 and 1996. However, when asked in 1995/1996 what type of “preservation activities are the ones most needed to help protect historic places,” the majority responses were education programs, economic related preservation information, leadership training, and technical training (Working Together, pg. 6). These were, however, also given as examples in the question when posed. When asked in 1996 to rank seven pre-defined categories of activities as to which would benefit individuals the most from a cooperative effort, respondents ranked *managing cultural resources* the highest, followed by *technical assistance in preserving and developing resources* and *technical assistance in fund raising* (Working Together: Appendix A).

Who are You? (Question 7).

The 60 respondents out of approximately 220 individuals polled (27% response rate) appear to include a good cross-section representation of historic preservation professionals in Montana. The respondents identified their primary role in historic preservation as: government cultural resource/preservation specialists (19), cultural resource consultants (12), architects (15), other individuals in government (6), museums/historical society staff (3), university faculty (2) and other (2). There was also a single Native American respondent.

Notably under-represented among respondents are Native American tribal culture contacts listed in the Montana Historic Preservation Services Directory. Input from the tribes will need to be obtained in another survey or by other means, as is also the case for the general and/or interested public not polled with this questionnaire.

MFB assisted by MC
11/2001

Montana 2001 Historic Preservation Questionnaire #1 Results

1. Issues affecting Montana historic preservation efforts: The following issues were identified by public and professionals during the writing of the 1997 Montana Historic Preservation Plan, *Working Together*. Please rate the significance of their effect on a scale of 1 to 10. You may give the same rating to a number of issues.

	Significance rating (from 1 = insignificant to 10 = very significant)	
	2001	1996
1. Shifts from industry/agriculture to service based economy.....	5.53-	4.55-
2. Shifts in land use and settlement patterns	7.15	6.92
3. Availability of financial resources	8.23 ¹	8.06 ²
4. Impact of increased visitation on cultural/historical sites	6.77	6.95
5. Suburban sprawl's effect on Main Streets	7.48 ⁴	6.99
6. Local ability to preserve historic/cultural resources	7.72 ²	7.92 ⁴
7. Housing affordability and availability	5.16-	4.36-
8. Loss of culture/traditions due to passing generations	7.05	5.92
9. Baby-boomer attitudes about preservation	5.36-	4.36-
10. Information age communication changes	4.94-	5.60-
11. Transportation changes from rail/rural roads to airports/highways	5.55	5.70
12. Fluctuating public policy and philanthropic interests	6.04	6.74
13. Vandalism and/or deterioration of historic resources	7.05	7.93 ³
14. Public awareness of culture/preservation issues	7.55 ³	8.23 ¹
15. Decline of volunteerism	5.66	***
16. Lack of consensus in historic preservation community	5.36	***
17. Legal framework for protection of cultural resources on public land ...	6.37	***
18. Legal framework for protection of cultural resources on private land ..	7.00	***

Notes:

2001 : N = 53 to 56

1996 : N = 27 (Results from *Working Together*, Appendix A: Questionnaire #2)

- ¹ : Top four significance ratings
- : Bottom four significance ratings
- *** : 1996 write-ins

Montana 2001 Historic Preservation Questionnaire #1 Results

2. Goals for historic preservation in the next 5 years: Please read the following nine goals adopted in the 1997 Montana Preservation Plan, *Working Together*. You may add up to 3 more goals. Then rate each goal on a scale of priority from 1 to 10. You may give the same rating to a number of goals.

Priority rating
(from 1 = low priority
to 10 = high priority)

1. Conserve Montana's cultural resources	9.11	Mission (1)
2. Incorporate preservation into public decision making	8.23	(2)
3. Strengthen historic preservation at the local level	8.08	(3)
4. Educate the public about Montana history and historical places	7.62	(5)
5. Encourage cooperation between government agencies in preservation..	7.66	(4)
6. Identify sources for technical and financial preservation assistance	7.52	(6)
7. Study issues and develop plans for preservation	6.89	(8)
8. Promote cultural resources as a tool for economic development	7.15	(7)
9. Create recreation links among Montana's natural and cultural sites	6.24	(9)

Write-ins (10, 11, 12)

- (4) Involve tribes/reservations/THPOs
- (3) Create on-line database/manage information
- (3) Make historic preservation more politically appealing
- (2) Promote preservation success-stories
- (2) Provide incentives for adaptive reuse

- . Conduct regular statewide meetings
- . Promote land-use planning
- . Prevent demolition without intelligent, complete studies
- . Encourage cooperation between government and private sector
- . Stabilize threatened structures
- . Conduct travelling heritage education presentations
- . Promote tax credit program
- . Lobby for homeowner tax credit
- . Develop predictive models for heritage property locations for planning
- . Establish historic contexts and significance criteria
- . Promote the state historic preservation plan
- . Create opportunities for public participation
- . Legitimize sources of technical assistance
- . Identify and prioritize at-risk sites
- . Conserve paleontological resources
- . Utilize media to raise public awareness
- . Focus on street-scapes
- . Conserve all historic properties – significant or not.
- . Enforce local preservation goals

Notes:

N = 51 to 53

(#) 2001 Rank of goals based on priority ratings. Goal 1 adopted as Mission statement (1996)

Montana 2001 Historic Preservation Questionnaire #1 Results

3. State Historic Preservation Office Programs: Please *rank* in order (1, 2, 3 ... 10) the following ten SHPO Programs by their relative importance to you and their relative importance to statewide preservation, with “1” being the most important and “10” the least important. Then *rate* the current effectiveness of each program on a scale of 1 to 10, where 10 is “doing great” and 1 is “doing poorly.” You may give the same effectiveness rating to a number of programs.

	Order of importance (1, 2, 3, ... 10)		Effectiveness (from 1 = doing poorly to 10 = doing great)
	To you	Statewide	
Administration (<i>oversight, staff, policy, budget</i>)	8 (5.9)	6 (5.4)	7.2 (5)
Planning (<i>state plan, goals, contexts, public input</i>)	5 (5.2)	1 (4.5)	6.3 (9)
Survey and Inventory (<i>recording and databases</i>)	1 (3.8)	2 (4.8)	7.4 (3)
National Register of Historic Places (<i>inc. signs</i>)	4 (4.9)	4 (5.0)	7.6 (2)
Review and Compliance (<i>inc. Section 106</i>)	3 (4.6)	7 (5.9)	7.3 (4)
Tax Credit Review for Rehabilitation	10 (7.7)	10 (6.6)	6.7 (7)
Certified Local Govts (<i>local preservation offices</i>)	9 (6.3)	8 (6.0)	6.9 (6)
Matching grants for survey & bricks n’ mortar	7 (5.9)	9 (6.3)	6.0 (10)
Technical assistance and advice	2 (4.4)	3 (4.9)	7.7 (1)
Heritage education and outreach	6 (5.8)	5 (5.1)	6.5 (8)

Notes:

. Some questionnaires not tabulated due to confusion, e.g. importance ordering ranked like effectiveness where more than one number was used twice.

Importance to You: N = 30 to 31

Importance statewide: N = 22 to 23

Effectiveness: N = 26 to 36

. Importance (1 to 10) calculated for each program by totaling rank order values and dividing by number of responses; calculation provided in (.). Rank importance 1,2,3... based on order of calculated averages. 1 = most important; 10 = least important

. Effectiveness (10 to 1) calculated by total of values divided by number of responses: 10 = doing great; 1 = doing poorly; order of program effectiveness provided in (.): 1 = most effective; 10 = least effective.

4. If the Montana State Historic Preservation Office had an additional \$100,000 to invest, which of the above programs would you suggest putting the money into?

1. Matching grants (n=24)
2. Heritage education/outreach (n=16)
3. Survey & inventory (n = 14)
4. Technical Assistance (n =11)

Certified Local Governments (5); Planning (4); National Register (3); Compliance (3)
Tax Credit (2); Admin (1)

Notes:

Total N = 83. Majority of responses indicated a single program; some responses included 2 or 3 programs.

Montana 2001 Historic Preservation Questionnaire #1 Results

5. List up to three *kinds* of Montana heritage properties (eg. types of historic structures like post offices, traditional cultural places like rock art, or archaeological sites like tipi rings) that you feel merit special attention in the next 5 years:

Historic Sites (N = 85)

- 16 Rural Agriculture Buildings (barns, grain elevators, homesteads)
- 14 Downtown Buildings/Mainstreets
- 12 Railroad Features/Depots
- 7 Roads/Trails
- 6 NPS/USFS Structures; Lookouts
- 5 School Buildings
- 4 Historic Neighborhoods/Residences
- 3 Ghost Towns/Mining Sites
- 2 "Historic Structures"
- Sheep Camps
- Modernist Buildings (1940s-1960s)
- Post Offices
- Traditional Buildings
- Historic Theatres
- Women's Clubhouses
- Log Cabins (private)
- Irrigation Systems
- Churches
- Bridges
- Abandoned private structures
- Warehouses
- Military History sites
- Courthouses
- Reservation Period Sites
- National Historic Monuments

Archaeological Sites (N = 30)

- 12 Archaeological Sites
- 10 Rock-Art Sites (*see also Traditional Cultural Sites*)
- 3 Archaeological Districts/Settlement Patterns
- Tipi Rings
- Historic Archaeological Sites
- Paleontology
- Stratified Archaeological Sites
- Easily accessible Archaeological Sites

Traditional Cultural Sites (N = 17)

- 10 Rock Art (*see also Archaeological Sites*)
- 4 Religious Sites/TCPs
- 2 Traditional Cultural Lands
- Multi-cultural places

Landscapes (N = 6)

Notes: Rock Art sites counted twice

Montana 2001 Historic Preservation Questionnaire #1 Results

6. What type of guidance in historic preservation would be most beneficial to you?

Answers to specific technical questions	7
Sources of grants/financial aid	7
Historic contexts with registration requirements	3
Tax Credit/Rehabilitation grant information	3
Course on Section 106/National Register eligibility	2
Training for survey volunteers/historic inventory	2
Preservation technical briefs	2

Description/history of existing properties
Local preservation planning
How to deal with private structures on public land
On-line access to information databases
Public awareness pieces/preservation news
How to evaluate 1950s residences
Preservation workshop/retreat
Cooperation between state agencies
How to protect cultural resources
Legalities of ownership
Annual SHPO-Contractors Meeting
Tribal coordination and issues
NPS technical experts
Cell tower compliance procedures
Writing historic structures reports

7. What is your primary role in historic preservation?

<u> </u> * <u> </u>	Interested public
<u> </u> 1 <u> </u>	Tribal representative/Native American
<u> 19 </u>	Local/State/Federal government cultural resource/preservation specialist
<u> </u> 6 <u> </u>	Other local/state/federal government agency role
<u> 12 </u>	Cultural resource/environmental consultant
<u> </u> 3 <u> </u>	Museum/historical society
<u> </u> * <u> </u>	Business that consults with SHPO
<u> 15 </u>	Architect/Historic building restoration
<u> </u> 2 <u> </u>	University
<u> </u> 2 <u> </u>	Other (Conservation easements; unknown)

Notes:

Total respondents = 60

Categories of Architect and University added based on respondent's address.

Thank you!